

JUNE

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1992

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Gay & Lesbian: A Market Comes of Age • An Interview with Paul Monette

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By Bob Summer

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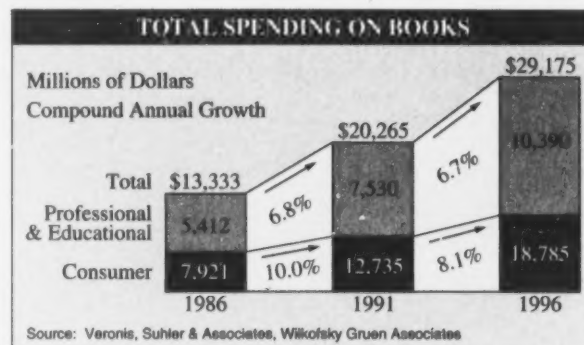
Strong 5-Year Growth Seen For Publishing Industry

Veronis, Suhler forecast finds books more than holding their own against video

Consumer spending on books is expected to grow 7.6% annually over the next five years, rising from \$20.3 billion in 1991 to \$29.2 billion in 1996; with trade books increasing annually by 8.1%, to \$18.8 billion; and professional and educational by 6.7%, to \$10.4 billion, during that period.

Such is the estimate made by Veronis, Suhler & Associates in its annual "Communications Industry Forecast," just published. The company went on to predict that spending on trade books, which has grown at an annual rate of 10% in the past five years, would slow down, mainly because of lower anticipated spending in the hitherto booming children's book market due to a birth decline.

Veronis, Suhler said that spending on trade books had grown 7.7% in 1991, or more than twice the rate it had predicted: "Consumer books remained relatively



unaffected by the downturn," the report said. This represented more spending on books in 1991 than on videocassettes or cable TV subscriptions, and seemed to go against the observation by some that books have been losing ground to other forms of home entertainment. In fact, noted Veronis, Suhler, "There is no evidence to suggest that the incidence of book reading or purchasing is declining or that the new technologies are replacing book

reading."

The company also noted that book buying seems to take place evenly over the income distribution of the population, with 45% of books purchases made by people with incomes less than \$30,000. Consumers, said the report, "have dem-

onstrated sensitiveness to book price increases over the last five years; sluggish unit sales have generally accompanied aggressive price increases, while large unit sales gains have been associated with stable or declining prices. In 1991, publishers moderated their price increases and generated substantial unit sales gains despite the recession." The analysts expect that record to encourage publishers to continue with only moderate price increases.

S & S Exec Moves To Globe Pequot

John F. Whalen Jr., director of national accounts for the trade division at Simon & Schuster, is moving to Globe Pequot Press—a small Connecticut-based publisher only a fraction of the size of S & S—as marketing director.

For Whalen, after six years at Simon & Schuster, it will be a chance to work in a "hands-on" way with the areas of Globe Pequot—sales, foreign rights, publicity—that report to him, and for a kind of personal input into publishing decisions that is much more difficult to achieve at a very large house. It is a style of publishing, he said, that he already began to appreciate when he found himself being introduced to the entire Globe Pequot staff. "They wanted to be sure I'd be harmonious with the existing staff," he explained.

For her part, Linda Kennedy, editorial director, was enthusiastic about the idea of bringing big-time sales experience to their small house. Whalen said that these days small presses are doing much of the research and development for the larger publishers. —J.F.B.

Frankfurt '92 Bigger Than Ever: No Dropoff in U.S. Space

Despite a publishing slump almost everywhere, and following much tough talk about downsizing among some prominent U.S. exhibitors, the Frankfurt Fair that opens September 30 will be at capacity yet again. As the deadline for space applications expired in March, there were again more demands on space than could be honored—including ones from Americans, who had to join a growing waiting list.

At press time Frankfurt's technical director had requests from some 5900 individual exhibitors; at the same time last year—considerably after the filing deadline—he had 5750.

"The fair has to be bigger," was his message.

The Exhibitions and Fair Agency, which runs Frankfurt for the combined German booksellers and publishers associations reports that, without exception, U.S. publishers have maintained their previous stand dimensions; one of the biggest New York groups even managed to scrounge an extra 200 square feet. Penguin USA has agreed to move upstairs with its British company.

More countries than ever will be participating, largely thanks to the new situation in Eastern Europe. Any effects of recession? Accord-

ing to fair director Peter Weidhaas, "When conditions are bad, publishers come here in greater numbers because they feel they have to make a greater effort than before."

At a recent meeting with the trade press in Frankfurt, Weidhaas addressed the concerns of U.S. exhibitors, who won their fight for a return to Hall 4, the main international pavilion, after a move last year to Hall 3. They will occupy the ground floor of the hall, just below their British trading partners. Weidhaas knows they are concerned about costs, and says, "We'd like to see American publishers spending less, and thus not feel that their costs exceed the benefits. It's not our fault that the big stands have

been getting bigger, or that so much is spent on parties where you always see the same faces." Despite a 4.5% rent hike for stands this year, Frankfurt management claims theirs is among the cheapest international book fairs.

In an effort to lure as many participants as possible from the new nations of Eastern Europe, the Exhibition Agency has launched an appeal to leading houses in the eight largest book-producing countries to sponsor travel and lodging for individual publishers from the East, who will get their stand space gratis. Some 14 letters went out, but there has been only a handful of replies so far—none at all from the U.S.

—HERBERT R. LOTTMAN

PW STATISTICS

Balancing the Books, 1991

A high ratio
of exports to
imports; world
totals reported

BY CHANDLER B. GRANNIS

American book exports in 1991 reached about \$1.5 billion (up 4.9%), and imports were a little below \$378 million (up 3.9%), according to the U.S. Department of Commerce. The ratio of exports to imports was about 63-37, not as high as it had been in 1970 (66-34) but an improvement over a period in the mid-1980s when exports and imports were running about even. It is too early to tell whether 1992 will continue the trend of 1991; so far, according to William S. Lofquist, publishing industry specialist at Commerce, the dollar value of export shipments in the first quarter of 1992 increased 9.7% over the same period of 1991, while imports rose by 11.7%.

Lofquist notes that country-by-country trends (Tables 5 and 6), especially those for imports, reflect two roughly different classes of shipments—those brought in usually “for content” and those that more often consist of production done abroad for American publishers.

Comparing Commerce figures with the annual sales survey of the AAP, it appears that U.S. book exports in 1991 accounted for about 9.3% of all U.S. publishers' sales (which totaled over \$16.4 billion). Canada holds its position as the principal customer for U.S. books, accounting for 42% of the 1991 total.

Among major groups, exports of professional books increased by 49% and textbooks by 124.3%. The im-

TABLE 1

U.S. BOOK EXPORTS, 1991 Shipments Valued at \$2500 or more (dollars and units in thousands)

	1991 \$	% Chg. 90-91	1991 Units	% Chg. 90-91
Dictionaries	\$8,956.0	+92.2	1,706.6	+38.3
Encyclopedias	57,146.0	+45.6	10,135.6	+51.4
Textbooks	242,204.0	+126.3	36,324.0	+46.0
Bibles & Other				
Religious Books	50,584.0	+9.5	41,615.0	+9.1
Technical, Scientific, & Professional Books	466,403.0	+49.0	71,902.5	+55.6
Art & Pictorial Books	18,824.0	+54.0	10,011.0	+41.8
Hardbound Books not elsewhere indicated	189,577.0	—	35,951.6	—
Rack-size Paperbound	141,316.0	—	88,082.2	—
*Books over 48 pp. plus covers n.e.i.	354,244.0	—	443,380.6	—
Children's Picture Coloring, Drawing	19,154.0	—	34,442.0	—
Music Books	16,369.0	—	2,431.0	—
Atlases	3,003.0	—	474.6	—
TOTAL EXPORTS	\$1,497,761.0	+4.9	776,454.3	—

*Includes paperbacks not counted elsewhere.

TABLE 2

U.S. BOOK IMPORTS, 1990-1991 Customs Valuation (dollars and units in thousands)

	1991 \$	% Chg. 90-91	1991 Units	% Chg. 90-91
Dictionaries, Thesauruses	\$6,242.0	-11.3	1,595.5	-62.2
Encyclopedias (incl. installments)	7,550.0	+5.7	1,074.4	+12.4
Textbooks	80,689.0	-7.3	16,032.6	-10.5
Bibles & Other				
Religious Books	32,627.0	-3.1	40,227.1	-1.0
Technical, Scientific, Professional	126,366.0	+12.2	23,948.4	-2.5
Art, Pictorial:				
under \$5 each	16,551.0	-5.8	31,066.6	+158.4
\$5 and up each	24,484.0	-15.4	2,288.7	-11.3
Hardbound Bks n.e.i.	324,512.0	+3.1	95,501.2	+2
Rack-size Paperbound	54,013.0	+29.9	41,681.7	+22.3
Books 49 pp. or more n.e.i.	133,194.0	-2.2	70,654.7	+1
Children's picture, coloring, drawing	65,449.0	+29.4	77,062.1	—
Music n.e.i.	2,743.0	-23.8	725.9	—
Atlases	3,336.0	-22.6	763.2	—
TOTALS	\$877,757.0	+3.9	402,622.1	—

provements in import figures were made possible by cooperation with Canadian authorities.

Tables A, B and C show total numbers of books published in selected countries and numbers of transla-

tions, by country and by language from which translated. The *UNESCO Statistics 1991 yearbook* is the source. The latest title output totals are for 1987, 1988 and 1989. The translation figures are for 1983, 1984

and 1985. UNESCO does not report U.S., U.K. and Canadian titles and translation statistics; the figures for these countries have been taken from *PW*, the *Bookseller* of London and *Statistics Canada* in Ottawa.

TABLE 3

BOOK EXPORT-IMPORT RATIOS

(Millions of dollars)

	Exp.	Imp.	Approx. ratios
1991	\$1,497.8	\$877.8	63-37
1990	1,428.0	902.2	61-39
1985	591.2	564.3	51-49
1980	518.9	511.6	50.1-49.9
1975	269.3	147.6	60-40
1970	174.9	92.0	66-34

TABLE 4

U.S. BOOK EXPORTS COMPARED TO TOTAL U.S. BOOK SALES, 1970-91
(in millions of dollars)

	Exports	Tot. sales	Exports as % of total sales
1991	\$ 1,497.8	\$ 16,144.9	9.3
1990	1,428.0	15,365.1	9.4
1985	591.2	10,156.0	5.8
1980	518.9	6,411.0	8.1
1975	269.3	3,789.3	7.1
1970	174.9	2,677.0	6.5

TABLE 5

U.S. BOOK IMPORTS FROM MAJOR COUNTRIES, 1990-1991
Customs Valuation (Ranked by 1991 dollar amounts, in thousands)

	1991 \$	1990 \$	1991 Units	1990 Units
United Kingdom	\$187,008	\$209,363	47,463.8	59,412.7
Hong Kong	156,345	131,207	69,089.4	61,110.5
Japan	88,636	107,256	25,106.5	61,048.7
Italy	82,683	78,542	77,001.5	53,740.3
Singapore	76,428	53,779	37,742.4	19,757.6
Canada	57,664	50,887	61,772.5	92,332.3
Germany, West	47,792	37,573	7,334.4	11,490.9
Spain	29,688	37,078	10,320.4	12,844.0
Mexico	16,586	7,906	5,757.9	5,800.9
Netherlands	14,960	13,510	2,484.6	5,448.6
Columbia	14,164	10,404	11,524.2	5,883.9
Korea, S.	13,609	11,484	6,217.4	7,658.7
France	12,546	10,601	4,191.8	5,248.5
Belgium	9,821	10,440	4,936.3	4,864.9
Taiwan	8,381	8,926	5,687.0	3,303.2
Switzerland	7,534	9,455	978.9	2,348.9
Israel	6,675	5,756	1,630.1	1,249.0
Australia	5,578	6,618	1,945.9	2,097.8
Denmark	5,495	6,279	990.3	2,289.9
Sweden	5,364	5,174	1,283.3	1,369.5
China	5,213	3,186	6,869.3	1,351.4
Yugoslavia	4,378	7,609	1,983.1	4,506.4
Ireland	3,928	2,010	403.4	394.1
Norway	1,973	718	147.2	235.4
Austria	1,884	920	683.3	387.7
Thailand	1,627	719	1,379.5	621.6
Malaysia	1,537	2,063	1,119.2	735.2
Portugal	1,297	2,456	488.7	922.0
Venezuela	832	1,319	1,214.7	2,196.0
India	822	1,217	363.8	335.3
WORLD TOTALS	\$877,757	\$845,098	402,622.1	441,059.2

TABLE 8

U.S. BOOK EXPORTS TO MAJOR COUNTRIES, 1990-1991
Shipments Valued at \$2500 or More (Ranked by 1991 dollar amounts, in thousands)

	1991 \$	1990 \$	1991 Units	1990 Units
Canada	\$643,911	\$664,448	390,885.5	935,424.3
United Kingdom	208,091	171,391	92,600.5	64,743.9
Australia	118,043	106,274	55,075.7	50,641.8
Japan	85,638	87,562	38,717.8	39,113.4
Germany, West	48,550	42,244	17,872.8	15,856.3
Netherlands	37,642	33,715	13,844.8	13,321.7
Mexico	36,109	32,337	12,553.2	11,064.9
Singapore	32,605	31,321	19,468.4	15,467.2
France	23,030	20,144	7,773.6	8,091.4
Taiwan	18,029	15,304	6,605.5	6,004.2
Spain	14,985	9,687	4,557.1	3,916.0
Hong Kong	14,495	12,853	9,547.3	5,517.7
Rep. South Africa	13,572	11,378	10,906.3	7,993.2
Brazil	13,414	12,451	4,701.8	4,924.1
Korea, S.	12,313	8,245	5,650.0	3,054.1
Switzerland	11,235	9,854	4,125.9	4,083.6
Philippines	10,863	10,560	6,770.5	5,369.5
Italy	10,426	9,799	3,563.6	3,172.4
India	9,821	17,576	3,462.0	5,213.3
New Zealand	7,711	9,600	3,956.1	4,807.0
Ireland	7,692	7,946	2,292.7	1,826.7
Argentina	7,637	5,746	5,626.9	4,987.1
Sweden	5,655	6,597	2,036.1	1,864.0
Belgium	5,655	3,603	2,076.0	1,067.1
Venezuela	5,170	4,772	5,404.3	5,275.2
Denmark	5,150	4,012	1,885.7	1,354.6
Nigeria	5,020	1,201	2,864.2	1,523.9
Malaysia	4,981	3,998	1,807.5	1,483.6
Saudi Arabia	4,675	3,483	2,294.2	1,763.1
Israel	4,161	4,321	2,160.9	1,826.5
Finland	4,149	5,095	1,276.3	2,796.0
Thailand	3,318	3,368	1,076.1	1,083.8
Austria	3,297	1,271	912.0	397.1
WORLD TOTALS	\$1,497,767	\$1,428,003	776,454.3	1,266,768.0

TABLE A

TRANSLATION PUBLISHING
By Principal Countries, 1983-1985

	1983	1984	1985
Brazil	1,433	1,331	3,500
Czechoslovakia	1,161	1,272	1,319
Denmark	1,503	1,659	1,610
Finland	1,250	1,421	1,487
France	3,436	3,821	4,679
Germany, East	909	674	746
Germany, West	7,600	6,868	5,559
Hungary	1,397	1,238	1,202
Italy	2,939	2,289	(?) 93
Japan	2,498	2,698	2,892
Norway	1,004	1,251	448
Poland	704	615	705
Spain	7,447	7,741	7,944
Sweden	1,996	1,916	1,900
Switzerland	1,106	1,084	998
Turkey	808	1,152	987
USSR	7,443	7,758	8,039
UK	1,143	1,153	1,121
USA	969	1,439	1,389
Yugoslavia	1,297	1,280	1,590
All Countries	55,618	52,405	57,374

TABLE B

WORLD TRANSLATION PUBLICATIONS
From Selected Languages 1983-1985

	1983	1984	1985
English	24,468	22,724	26,690
French	6,084	4,422	6,327
German	4,818	5,311	4,847
Russian	6,370	6,230	6,337
Italian	1,645	1,544	1,581
Scandinavian	2,176	2,192	1,675
Spanish	847	839	828
Classical, Greek, Latin	1,116	1,035	896
Hungarian	665	679	—
Arabic	322	536	233
Japanese	222	204	254
Chinese	148	163	161
Others	7,427	7,470	7,545
WORLD TOTALS	55,618	52,405	57,374

TABLE C

WORLD BOOK TITLE OUTPUT 1987-1989

Principal Publishing Countries

	1987	1988	1989		1987	1988	1989
AFRICA				EUROPE continued			
Egypt	1,276	1,451	—	Germany, East	6,515	6,526	6,018
Nigeria	2,352	1,424	1,466	Germany, West	65,670	68,611	65,980
Tunisia	1,160	293	—	Hungary	9,111	8,621	8,631
NORTH AMERICA				Iceland	1,231	1,244	1,250
Canada	7,263	7,550	8,249	Italy	17,109	19,620	22,647
Cuba	2,315	2,069	2,199	Netherlands	13,329	13,845	15,392
Mexico	7,725	4,826	3,490	Norway	6,757	4,894	5,331
United States	56,027	52,069	53,446	Poland	10,416	10,728	10,286
SOUTH AMERICA				Portugal	7,733	—	—
Argentina	4,836	—	—	Romania	—	—	3,867
Chile	1,654	1,840	2,350	Spain	38,302	35,426	38,353
Colombia	—	—	1,486	Sweden	11,516	11,794	11,197
Venezuela	1,202	—	—	Switzerland	12,410	12,698	13,270
ASIA				United Kingdom	59,839	62,069	61,195
Bangladesh	1,709	1,209	—	Yugoslavia	10,619	12,100	11,339
China	—	—	74,973	OCEANIA			
India	14,965	14,408	11,851	Australia	40,963	—	—
Indonesia	2,052	1,687	1,396	U.S.S.R.			
Iran	2,996	3,401	6,289	U.S.S.R.	83,011	—	76,711
Japan	36,346	—	—	Byelorussia	—	2,962	—
Korea, South	44,288	42,842	39,267	Ukraine	8,134	8,311	—
Malaysia	—	—	3,348				
Philippines	1,768	1,072	—	SOURCE: UNESCO Statistical Yearbook, 1991, except U.S. figures, derived by Publishers Weekly from R.R. Bowker Data Services; U.K. figures from The Bookseller, London; Canadian figures from Statistics Canada, (Michel Frève, Book Publishing Survey manager), Ottawa. U.S. figures do not include publications of state and local governments, some institutions, company reports, proceedings, lab manuals, yearbooks, U.S. Government Printing Office output and university theses. However, the books of University Presses, religious organizations and other nonprofit publishers are included.			
Sri Lanka	—	—	2,188				
Thailand	—	—	11,217				
EUROPE							
Austria	8,910	8,360	9,462				
Belgium	7,091	8,289	6,822				
Bulgaria	4,583	4,379	4,543				
Czechoslovakia	10,565	9,558	9,294				
Denmark	11,129	10,584	10,762				
Finland	9,106	10,386	10,097				
France	43,505	39,026	40,115				

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